

## CM/ECF Maintain User Accounts

### *For Attorneys and Trustees*

All CM/ECF users will be issued an account with a user login and password. The CM/ECF login provides registered users the ability to submit pleadings electronically to the court. Public users (attorneys and creditors) must also log into PACER to inquire on cases or look at reports. Existing PACER logins and passwords will be accepted.

Non-court users can access their own account information through the Maintain Your ECF Account menu. Using this option, participants can update their name, mailing and E-mail addresses, phone and fax numbers, and password. Users can therefore control the accuracy of their own information in a timely manner.

This module explains how attorneys and trustees can update:

- ◆ user name, address and other party data
- ◆ E-mail information
- ◆ electronic noticing preferences
- ◆ user login and passwords.

**STEP 1** After clicking on **Utilities** on the CM/ECF Main Menu bar, select Maintain Your ECF Accounts, which is found under the **Your Account** sub-menu. (See Figure 1.) Your UTILITIES screen may vary from the one displayed in this example.

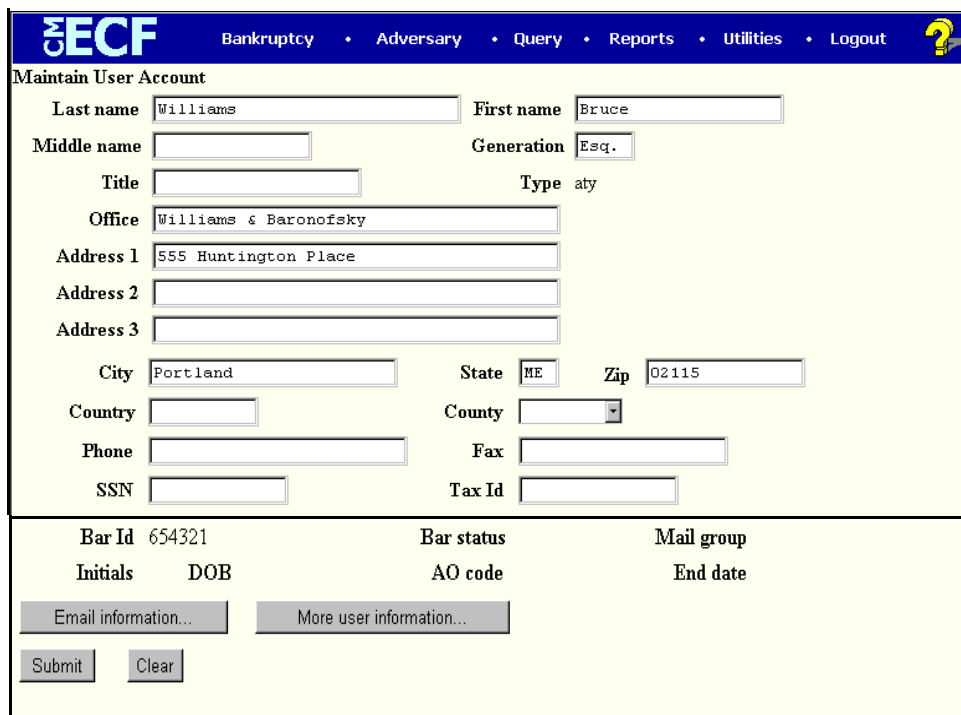


The screenshot shows the ECF Utilities page. The header bar is blue with the ECF logo on the left and navigation links (Bankruptcy, Adversary, Query, Reports, Utilities, Logout) in the center. A yellow question mark icon is on the right. The main content area is yellow and titled "Utilities". It contains several sections: "Your Account" with links "Maintain Your ECF Account" and "View Your Transaction Log"; "Edit Data" with a link "Edit Claims"; "Miscellaneous" with links "Legal Research...", "Mailings...", and "Verify a Document"; and a bottom section with links "Access Control...", "System Administrator Reports...", and "Update System Tables...". A mouse cursor is pointing at the "Maintain Your ECF Account" link.

Figure 1

**STEP 2**

Your user account screen will appear displaying your current account information. (See Figure 2.)



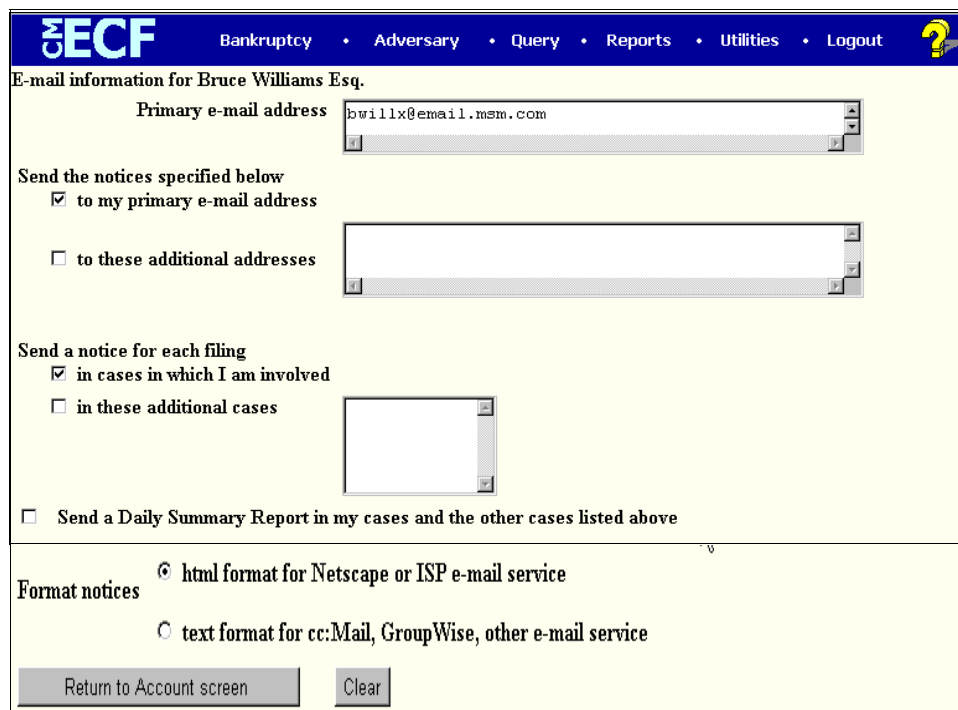
The screenshot shows the "Maintain User Account" form. The header bar is blue with the ECF logo on the left and navigation links (Bankruptcy, Adversary, Query, Reports, Utilities, Logout) in the center. A yellow question mark icon is on the right. The main content area is yellow and titled "Maintain User Account". It contains a form with the following fields: Last name (Williams), First name (Bruce), Middle name (empty), Generation (Esq.), Title (empty), Type (aty), Office (Williams & Baronofsky), Address 1 (555 Huntington Place), Address 2 (empty), Address 3 (empty), City (Portland), State (ME), Zip (02115), Country (empty), County (empty), Phone (empty), Fax (empty), SSN (empty), and Tax Id (empty). Below the form are buttons for "Email information..." and "More user information...". At the bottom are "Submit" and "Clear" buttons.

Figure 2

- ◆ Update your personal information on this screen. When it is correct, click **[Submit]** to save the changes. If the **[Submit]** button is not used, the record will not be modified.
- ◆ The **[Email information...]** and **[More user information]** buttons provide further screens to modify your user profile. The following pages will explain these features in more detail.

**STEP 3**

The E-MAIL INFORMATION screen presents options for control of your electronic notification on each court's CM/ECF system. (See Figure 3a.)



The screenshot shows the 'E-mail information for Bruce Williams Esq.' screen. At the top is a blue navigation bar with the 'ECF' logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout, along with a help icon. The main content area has a yellow background. It includes a text box for the 'Primary e-mail address' containing 'bwillx@email.msm.com'. Below this are two sections for sending notices: 'Send the notices specified below' with a checked box for 'to my primary e-mail address' and an unchecked box for 'to these additional addresses' (with an empty text box); and 'Send a notice for each filing' with a checked box for 'in cases in which I am involved' and an unchecked box for 'in these additional cases' (with an empty text box). There is also an unchecked checkbox for 'Send a Daily Summary Report in my cases and the other cases listed above'. At the bottom, the 'Format notices' section has two radio buttons: 'html format for Netscape or ISP e-mail service' (selected) and 'text format for cc:Mail, GroupWise, other e-mail service'. At the very bottom are 'Return to Account screen' and 'Clear' buttons.

**Figure 3a**

You can request e-mail copies of notification on all cases to which you are a party or only on specific cases. You can receive e-mail activity throughout the day or a daily summary of all noticing activity. "All activity" includes notification of claims as well as other entries to a case. Each E-mail will include the case number and name of the docket entry in the subject line of the mail message.

Each section on the EMAIL INFORMATION screen is explained below:

- ◆ **Primary E-mail address.** This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate E-mail account for CM/ECF activity from your routine E-mail correspondence.
- ◆ **Send the notices specified below...**
  - ☐ **to my primary E-mail address**  
To activate CM/ECF notification you must first check the box next to your E-mail address.
  - ☐ **to these additional addresses**  
You may have notices sent to other E-mail addresses besides your primary E-mail address. (Paralegals or chambers staff may want to share this notification activity.) When entering multiple E-mail addresses, separate each address with a semi-colon.
  - ☐ **Send notices in cases in which I am involved**  
Checking this box will automatically inform the user when any filing has been submitted in a case where this person is a participant. Chapter 7 panel trustees and offices of the U.S. Trustee may find this advantageous for new filings as well as routine case activity.
  - ☐ **Send notices to these additional cases**  
You do not have to be a participant in a case to receive notification of activity. Trustees and attorneys can elect to be notified of activity in cases in which they have an interest but are not parties to the case. Court and chambers staff can monitor cases through this process also. It is possible to select both options.
- NOTE:** This list is maintained by each user. As you are involved in more cases or as cases close, you must update this screen.
- ◆ **Send a notice for each filing.**  
Checking this box means you will receive E-mail notices when activity occurs throughout the day to the account(s) specified above. The title of the E-mail will describe the type of filing and the case number.

◆ **Send a Daily Summary Report**

A comprehensive list of one day's activity can be sent once a day. Notifications for claims will also be included in this mail list. (See Figure 3b.)

A Summary report includes the case numbers and titles of cases in which activity occurred for that day. The text of the Summary E-mail notification will display the docket event and the document number (including the hyperlink).

**NOTE:** You cannot elect to receive both separate notices and the summary report.

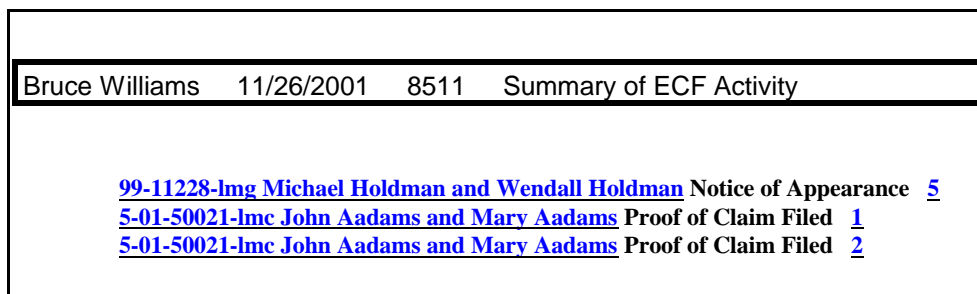


Figure 3b

◆ **Format notices**

Enter the E-mail delivery method. This selection will be determined by your E-mail type.

☐ **html format for Netscape or ISP E-mail service**

The html format will include hyperlinks to the document or claim. (See Figure 3c.)

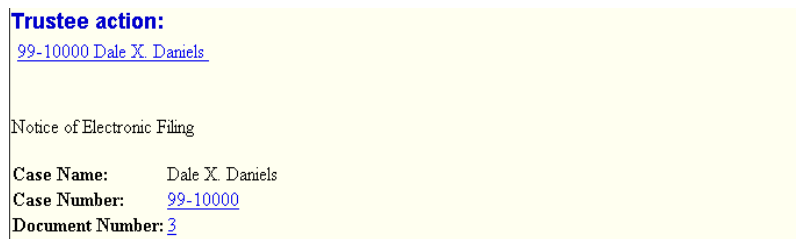


Figure 3c

- **text format for cc:Mail, GroupWise, other E-mail service**  
Text format will feature the URL of the PDF document which can be copied and pasted into the location bar of your browser.  
**Figure 3d** shows an example of a text formatted notice.

Notice of Electronic Filing  
The following transaction was received from Abraham P. Bellows on 1/23/2001 at 3 :51 PM CST

Case Name: William Wonka  
Case Number: 97-13259 <https://bkecf-train.aottd.uscourts.gov/cgi-bin/DktRpt.pl?252>  
Document Number: 2  
Copy the URL address on the line below into the location bar of your Web browser to view the document: [https://bkecf-train.aottd.uscourts.gov/cgi-bin/show\\_case\\_doc?2,252,,169281](https://bkecf-train.aottd.uscourts.gov/cgi-bin/show_case_doc?2,252,,169281),

**Figure 3d**

- ◆ When you have entered your E-mail preferences, click on **[Return to Account screen]** to save the data.

The screen in **Figure 3e** is used to confirm the information which has been submitted. If you checked any of the boxes for sending notices for each filing, or sending a Summary report, this screen will indicate the option is turned “on”.

Any additional case numbers (and hyperlinks) will be displayed under the **Case list:** heading. If invalid case numbers were entered, you will receive an error message after submitting the data and be given the chance to back up and enter a valid number.

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Updating person record...  
Update Person Prid: 333288

The update was successful... prid 333288 - Kerry Ledford

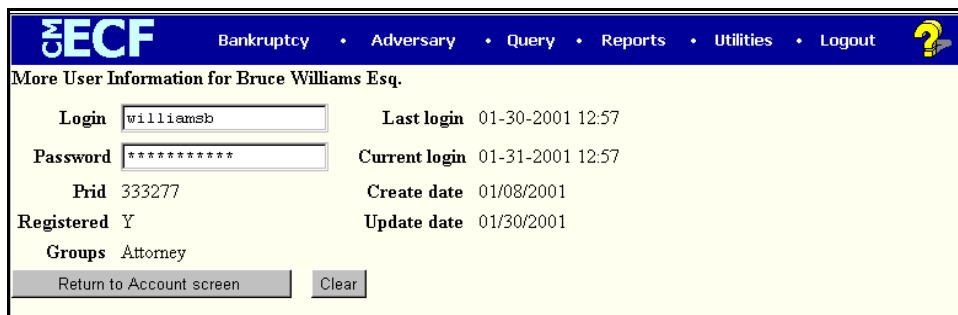
Updating user record  
The user update was successful

Set up automatic e-mail notification complete for Kerry Ledford  
Send Notification in all cases for which you represent a party = on  
Send Notification to primary e-mail address = on  
Case list:  
[00-10122 Dale A. Daniels](#)  
[00-12243 George Stephanopolous](#)

E-mail notice of electronic filings for selected cases= on  
Summary e-mail = on  
Primary e-mail Address: ledfordk@aottd.uscourts.gov  
Additional e-mail Address:

**Figure 3e**

- STEP 4** If you click on **More user information** from your account screen, your login and password information will be displayed (**See Figure 4.**)



The screenshot shows the ECF (Electronic Case Filing) system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "More User Information for Bruce Williams Esq.". The main content area is yellow and contains user details in two columns. The left column includes fields for Login (williamsb), Password (masked with asterisks), Prid (333277), Registered (Y), and Groups (Attorney). The right column includes Last login (01-30-2001 12:57), Current login (01-31-2001 12:57), Create date (01/08/2001), and Update date (01/30/2001). At the bottom of the form are two buttons: "Return to Account screen" and "Clear".

Login	williamsb	Last login	01-30-2001 12:57
Password	*****	Current login	01-31-2001 12:57
Prid	333277	Create date	01/08/2001
Registered	Y	Update date	01/30/2001
Groups	Attorney		

Return to Account screen Clear

**Figure 4**

- ◆ You can change your own login and/or password here.

Remember:

- Logins and passwords are case sensitive.
  - These are alphanumeric fields
  - Passwords have a maximum of 8 characters
  - When you enter a new password it is displayed on the screen. Your subsequent queries to this screen will show only asterisks. (No one will be able to tell you what your password is. Contact the court if you forget your password.)
- ◆ When you have entered the information as desired, click on **[Return to Account screen]**.

**STEP 5** Your user account screen will appear again (See Figure 5.)

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

**Maintain User Account**

Last name  First name   
 Middle name  Generation   
 Title  Type   
 Office   
 Address 1   
 Address 2   
 Address 3   
 City  State  Zip   
 Country  County   
 Phone  Fax   
 SSN  Tax Id

Bar Id  Bar status  Mail group   
 Initials  DOB  AO code  End date

Email information... More user information...  
 Submit Clear

**Figure 5**

- ◆ When all of your account information is correct, click **[Submit]** to finish processing.

**STEP 6** A list of the cases you are associated with will then appear (See Figure 6.)

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

**Searching for existing Attorney Records**  
 Select the records to be updated

\*\*\* Update All \*\*\*  
 1961-10000 Dale B Daniels  
 1961-20000 Jed B. Clampet and Dolly B. Clampet  
 1961-20000 Jed B. Clampet and Dolly B. Clampet  
 1962-02000 Jed C. Clampett and Dolly C. Clampett  
 1962-02000 Jed C. Clampett and Dolly C. Clampett  
 1962-10000 Dale C. Daniels  
 1963-10000 Dale D. Daniels  
 1963-20000 Jed Jones Clampet and Dolly Jones Clampet  
 1963-20000 Jed Jones Clampet and Dolly Jones Clampet

Submit Clear

**Figure 6**



- ◆ If you want this new information to apply to all of the cases, click on **\*\*\*Update All\*\*\*** at the top of the list. To change information only on certain cases, hold down the **[Control]** key after selecting the first case number and click on the others, one at a time, to highlight them.
- ◆ When you have all of the desired cases or **\*\*\*Update All\*\*\*** highlighted, click **[Submit]** to apply the new information.
- ◆ The system will update the records and inform you that they were updated. You can then click on another selection in the **CM/ECF Main Menu Bar**.

## USER TRANSACTION LOG

All docketing activity is recorded through each user's **User Transaction Log**. This feature is found under Utilities on the CM/ECF Main Menu Bar. Information on this log can be selected by date range. A typical excerpt from a transaction log is displayed below. (See Figure 7.)

This record may be useful in researching case filings. Dates, case numbers, times and document type are tracked.

Your transaction activity is not accessible to other users besides yourself except for court systems staff.

ECF			Bankruptcy	Adversary	Query	Reports	Utilities	Logout
13539	07/30/2002 18:14:37	02-80001	Opened New BK Case 02-80001					
13541	07/30/2002 18:15:16	02-80001	Motion to Avoid Lien <i>on personal property</i> Filed by John Joe Doe w Certificate of Service. (Ivancsics, Susan)					
13542	07/30/2002 18:16:37	02-80002	Opened New BK Case 02-80002					
13544	07/30/2002 18:17:16	02-80002	Motion to Avoid Lien <i>on personal property</i> Filed by John Joe Doe w Certificate of Service. (Ivancsics, Susan)					
13545	07/30/2002 18:18:29	02-80003	Opened New BK Case 02-80003					
13546	07/30/2002 18:20:48	02-80003	Motion to Avoid Lien <i>on personal property</i> Filed by John Joe Doe w Certificate of Service. (Ivancsics, Susan)					
13547	07/30/2002 18:22:21	02-80004	Opened New BK Case 02-80004					
13548	07/30/2002 18:23:00	02-80004	Motion to Avoid Lien <i>on personal property</i> Filed by John Joe Doe w Certificate of Service. (Ivancsics, Susan)					
13549	07/30/2002 18:24:18	02-80005	Opened New BK Case 02-80005					
13550	07/30/2002 18:24:58	02-80005	Motion to Avoid Lien <i>on personal property</i> Filed by John Joe Doe w Certificate of Service. (Ivancsics, Susan)					
13552	07/30/2002 18:26:18	02-80006	Opened New BK Case 02-80006					

Figure 7